

# ENSURING NEW JERSEY'S CULTURAL LEGACY



# THE NEW JERSEY CULTURAL TRUST MISSION

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*The mission  
of the Cultural Trust  
is to ensure  
a stable and healthy  
cultural industry  
in New Jersey  
that is sustainable  
under fluctuating  
economic conditions.*

*The Trust Fund is a permanent,  
interest-generating fund  
that serves as an  
additional source of revenue  
to nonprofit arts, history, and  
humanities organizations  
for specific purposes  
that are crucial to ensuring  
fiscal and operational health,  
stability and durability.*

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The New Jersey Cultural Trust was established by  
P.L. 2000, c: 76 which is now N.J.S.A. 52:16A-72 et seq.  
and was signed into law on July 25, 2000.



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Historic Cold Spring Village



Front Cover:  
"THE CONSTRUCTORS" 1987  
steel, bronze and aluminum

George Segal 1924-2000

"The Constructors" is one of George Segal's largest outdoor sculptures. The sculpture was installed in front of the Mary Roebling Building in Trenton as part of New Jersey's Arts Inclusion program administered by the New Jersey State Council on the Arts. The I-beam, invented in Trenton, is a central element of the work, which celebrates industrial history, engineering, technology, human ingenuity and creativity.

Photo by Dan Dragan



# GOVERNOR'S MESSAGE

*T*hank you for your support of the arts, history and cultural organizations in the State of New Jersey.

Throughout our State, charitable non-profit arts, history and humanities organizations are hard at work improving our lives and building our communities. They tell the stirring story of New Jersey's past and light our imaginations with the vision of all we can be as a people, as a State and a Nation. From the American Revolution to the American stage, they provide our children with a sound education, celebrate our culture, revitalize our downtowns, attract tourism and support our economy. They show us who we are and give us pride.

Together the nonprofit arts and history organizations of our state contribute over \$1.5 billion annually to our economic activity and employ thousands of New Jerseyans from all walks of life. Business and industry weigh the cultural offerings of a region heavily when choosing where to locate and grow. If nothing else, the work that The New Jersey Cultural Trust can do to ensure the vitality of the arts and history through stabilization and capitalization is just smart business.

I commend the Trust on its many accomplishments over its first year of operation, which saw \$27.5 million in private endowment contributions. This is a remarkable start that validates the soundness of the New Jersey model. That is why I was proud to include \$10 million in the FY03 budget and why I am proud to support the important work the Trust does.

A society is most remembered by the culture it bestows upon the future, and New Jerseyans surely deserve the very best. An innovative public/private partnership dedicated to strengthening our State's cultural institutions, The New Jersey Cultural Trust is helping to ensure that future and that durable legacy for all. I look forward to working with the Trust to help build a better tomorrow.

**James E. McGreevey**  
*Governor of the State of New Jersey*





# SECRETARY OF STATE'S MESSAGE

*A*s New Jersey's 31st Secretary of State, it has been my great pleasure and privilege to serve the residents of the Garden State and help strengthen our communities. Traveling throughout the state, I have seen first-hand the remarkable diversity, talent and creativity of the 8 million people who call New Jersey home. I have also witnessed how the arts, history and humanities enrich our quality of life.



Since its inception, The New Jersey Cultural Trust has laid a sound and sturdy foundation on which the full promise of the state's cultural resources can be realized. Through its inclusive vision, the Trust champions a better New Jersey through financially healthy and stable arts, history and humanities organizations. The proverb says, "Give a man a fish and he eats today; teach him to fish and he eats for a lifetime." Through The New Jersey Cultural Trust, we are realizing the wisdom of these words in safeguarding our culture through the greater self-sufficiency, durability and flexibility of institutions on which we rely to preserve our past, enliven our present and inspire our future.

The goals of the Cultural Trust are ambitious, but no less so than our own personal aspirations to achieve the very best for our communities, our families and ourselves. We look to the coming year as a chance to advance further toward our goals of a better New Jersey through a stable cultural community.

**Regena L. Thomas**  
*Secretary of State*



# REPORT FROM THE CHAIR

**I**t has been my great honor to serve as the Chair of The New Jersey Cultural Trust in its inaugural year, and it is with both pride and thanks that I report great progress in our work. In a little more than a year we have transformed and animated the lofty words of a legislative bill into a program hard at work to build a better tomorrow. For that I thank the entire Board and staff of The New Jersey Cultural Trust for their diligence, insight and determination and on their behalf our Governor, our Legislature and our Secretary of State for their unflagging support of our work.



more than risen to the occasion! Even with the state's subsequent appropriation of \$10 million, the magnitude of private giving exceeds it and extends a collegial challenge back to keep pace and to ensure the continued buoyancy of private giving. An accelerated timetable to achieve our goal is now a subject for serious consideration.

As we enter our second full year of operation, I look forward to continued advances as we qualify more and more of New Jersey's arts, history and humanities groups and certify more donations. This will hasten the day

when the Trust can enter its next exciting phase of operation, to distribute interest earnings from the Fund as grants to qualified groups for projects that stabilize their finances and operations, build and improve cultural facilities and further grow their endowments.

In closing, I reiterate my thanks to Governor McGreevey, to the Legislature, to fellow officers, Board members and staff, to the Geraldine R. Dodge Foundation (which provided our very first donation on our very first day of existence) and to the remarkable cultural community of New Jersey for which it is such an honor to serve.

**Judi Dawkins**

*Chair*

Only two years ago The New Jersey Cultural Trust was still just an idea, yet to be born. But it held a bold vision of a means by which to ensure the vitality of New Jersey's arts and history, and gave us the opportunity to make history ourselves. With its signing into law in 2000 and the formation of its Board of Trustees in 2001, The New Jersey Cultural Trust began a quest to amass from state and private sources a sizeable permanent fund that could supplement other sources of support for our arts, history and humanities groups and for purposes that would build strength and durability.

From our inaugural Board meeting of July 2001 through the close of that year, we went about the work of building a program with a sense of great urgency, even as the economic and world events surrounding us filled us with deep concerns. How would the private sector respond to the challenge? How prepared to participate were cultural organizations? Would the large gift incentive, a unique provision of New Jersey's model, actually work? All the questions, post 9/11 and in a relentless bear market, stared us squarely in the face, and we awaited answers.

When the first applications to certify gifts arrived in December, we were both surprised and deeply gratified to learn how magnificently the private sector had risen to the challenge. Almost \$27.5 million had been contributed as large endowment gifts to qualifying cultural organizations, \$15 million more than the state had available to match at that time! This not only confirmed our original beliefs about the soundness and innovation of the New Jersey model, but also imbued us with new confidence about our future.

This truly is a successful and dynamic public/private partnership. The State of New Jersey was asked to do what no other state had done, and then did it; and the private sector had





# REPORT FROM THE EXECUTIVE DIRECTOR

*A*s The New Jersey Cultural Trust completes its first full year of operation, it is my honor as its Executive Director to deliver its first Annual Report for fiscal year 2001/2002.

Discussion about the need for a permanent source of additional funding to help stabilize the cultural community in New Jersey began a decade ago when observers of the growing nonprofit cultural industry in America began to recognize the myriad ways that it contributed to the vitality of communities. The connections to sound education and tourism were strong. The arts and history played central roles in the revitalization of cities. Their presence anywhere was a powerful magnet for the location and retention of business and the recruitment of the modern workforce. They taught tolerance and intercultural understanding in an increasingly multicultural world. Through preservation and practice they clarified and celebrated our identities as people, our values as a society and our aspirations for the future. They have commemorated our most glorious accomplishments, and in our darkest moments of tragedy they have memorialized our loss and given us meaning.

Ultimately, the numbers were impressive as study after study revealed economic impacts in the billions and nationwide in the trillions. Art and culture were our nation's largest export industry and claimed the third highest share of our gross domestic product.

Why then was there a controversy in the early 90's over public art that led to reductions in federal funding and had such negative impacts on the viability of cultural institutions? Why, when the New Jersey State Council on the Arts budget was cut by \$10 million dollars in 1990 did 33 arts organizations go out of business? Why, when the stock market drops and recession hits, do arts and history groups scramble to survive?

As organizations around the country such as National Arts Stabilization, Inc. and the Nonprofit Finance Fund, Inc. studied the questions, the answer was both obvious and startling. For all their good work, resourcefulness, productivity and value, the nonprofit cultural world was woefully undercapitalized. Assets were meager. Working capital and reserves were virtually non-existent.



Human resources were stretched beyond reasonable limits. The cultural community was vulnerable to every economic downturn because it was not as financially stable as businesses need to be.

As New Jersey studied these issues, the worst fears were confirmed. To achieve stability in the nonprofit arts and history community, over \$1 billion in new revenue was needed.

With the facts in hand, the arts and history community set out to find an answer. That answer became The New Jersey Cultural Trust, a permanent fund able to invest in the projects most likely to lead to stabilization.

The case, though, was not made on need alone, but on the realization of all the positive things to be made possible by achieving stability. By uncoupling the arts and history from the severest impacts of economic change, their full power and benefit to people and communities could be unleashed. Artists could do their best work, and organizations could grow their public programs, improve their quality and keep prices affordable at the same time. They could take prudent risks to reach new audiences without fear of risking core programs or income. The history of our communities could be preserved and interpreted and, along with the arts, draw visitors and dollars from outside our state. In-school programs, never self-sustaining and therefore always the first ones cut in tough times, could not only be sustained but expanded. Community issues, large and small, could turn to the arts and humanities for creative solutions and sustainable resources.

This is the vision of The New Jersey Cultural Trust. Our efforts in FY02 were devoted to animating that vision by making basic program components operational, creating a process to qualify organizations and certify donations. This report will show not only what we have accomplished this year, but also what we hope to accomplish over the next several years.

I thank the Board for the opportunity to lead this important effort for the non-profit cultural industry of our state and nation. I hope you will join in our excitement and enthusiasm about the prospects for New Jersey's success.

**Barbara Fulton Moran**  
*Executive Director*





# BACKGROUND

Over the past two decades, researchers of the nonprofit cultural industry nationwide, a movement that had experienced tremendous growth and proliferation since the mid-1960's, examined a curious and disheartening phenomenon. Cultural institutions, even those with great longevity, large and broad-based support, high quality product, strong earned income, gifted professional staff, well-run operations, and well-connected boards, suffered greatly and disproportionately in comparison to other industries at every down turn of the economy, and every major shift or reduction in public and private funding policy. Upon serious examination of the field, consensus about the conditions that create such vulnerability emerged. Plainly put, the nonprofit cultural industry was woefully undercapitalized. It was asset poor, without adequate reserves or working capital, understaffed and generally facing enormous expense in meeting facility needs.

In New Jersey the need for increased and sustainable resources for the arts came forward through the 1995 Governor's Conference on the Arts—Arts In Focus III—and ultimately became one of the six fundamental goals of the Arts Plan New Jersey, adopted on March 23, 1998. However, in addition to expressing the need for more funding in general, Arts Plan called for establishment of a "permanent source of annual support for the arts to augment current sources" sufficient, among other things "to stabilize arts organizations." The New Jersey State Council on the Arts, the Department of State and the Task Force on New Jersey History took the vanguard positions in leading the inquiry and research into permanent funding mechanisms, both nationwide and in terms of what may be possible in New Jersey. This entailed numerous meetings among these constituencies, consultations with colleagues and experts across the country, and research into needs, aspirations and public benefits of the arts, history and humanities.

The "Report of the Task Force on New Jersey History," released in June, 1997 extensively details the financial needs of the history community. It would require as much as \$575 million in capital funds, endowment funds and increased, annualized operating funds in order to begin to achieve potential and extend its full benefits to the people of New Jersey.

Similar studies were undertaken in 1998 and 1999 for the arts community. The National Arts Stabilization, Inc. study of 67 of the largest New Jersey arts groups revealed the need for \$292 million in endowment funds, and another \$14 million in

working capital. A companion study completed by the Eagleton Institute of all Arts Council grantee organizations substantiated the need for \$202 million in capital funds and another \$35 million in annual operating funds.

Thus in aggregate, by the close of 1999 the need for as much as \$1 billion in funding was established in order to stabilize and capitalize organizations to safeguard their future, build organizational capacity to serve the public and repair and build structures equal to the needs of the public.

Work began in January 2000 to design a New Jersey model for a cultural trust. Sponsors in both legislative houses introduced legislation on May 11, 2000 to create a New Jersey Cultural Trust that would seek over time to establish permanent investment funds as large as \$200,000,000. The legislation passed on June 20, 2000 without a single dissenting vote at any stage of the deliberation. On June 27, 2000 the FY2000/2001 budget was passed with the first \$10,000,000 state contribution to the Trust. On July 25, 2000 at the Trenton War Memorial, in front of more than 600 members of the New Jersey cultural community, the New Jersey Cultural Trust Act was signed into law.

Immediately upon signing representatives of the Geraldine R. Dodge Foundation presented the first private contribution in the amount of \$1,000,000. In December 2000, the WJS Foundation contributed \$20,000 to the Fund. It was matched by state dollars. Subsequent State of New Jersey appropriations to the Trust account as well as to the required separate administrative accounts for staffing and operations were made for FY02.

## *Fund Purposes*

The New Jersey Cultural Trust will provide funding to "qualified organizations" for the three purposes, each of which is defined in the Act:

- Building endowments
- Financing capital projects
- Improving organizational and financial stability

Qualified organizations are defined as "tax-exempt, non-profit organizations whose primary mission is to promote the performing, visual and creative arts in New Jersey or to promote and preserve history and humanities in New Jersey."

All colleges and universities and all units of state or local government, including all units, authorities or corporations they create are ineligible.



*Immediately upon signing, representatives of the Geraldine R. Dodge Foundation presented the first private contribution in the amount of \$1,000,000.*

## **Fund Goals and Mechanics**

The New Jersey Cultural Trust is a public/private partnership that seeks to amass through equal contributions from each sector at least \$200,000,000 that can be invested, the investment return from which may assist qualified organizations in the way described above. The proposition is that the State of New Jersey will annually appropriate \$10,000,000 over 10 years for its contribution in order to be able to match private contributions. When a private contribution is either certified or directly received into the Fund, the state appropriation in equal amount is also deposited in the Fund.

It is the Trust's responsibility and authority to designate "qualified organizations" and to certify contributions to their endowments.

The state match equal to the private contribution can be leveraged in two ways.

- 1) Direct contribution to the Fund
- 2) Contribution to the endowment of a "qualified organization."

When the private contribution to the endowment of a "qualified organization" is \$100,000 or more, 20% of the state's match will flow to that organization, the other 80% to remain in the Fund for investment. Private contributions may take the form of cash, but also securities, property, and other assets. Contributions to endowments received by qualified organizations after January 1, 2000 may be certified for state match.

The New Jersey Division of Investment manages the Fund under the guidance of the Trust Fund Board of Trustees.

Only after \$20,000,000 has been deposited in the Fund may its interest earnings be distributed as grants for the

purposes previously cited. The Board has discretion with regard to determining if investment income is to be distributed or re-invested. However, any funds to be distributed as grants are to be divided as follows: 50/50 between the arts and history. There are special provisions in the act for altering the distribution ratio in any given year, but only for a given year.

Three other agencies of state government will design and administer the programs to bring forward to the Trust recommendations for grant funding:

- New Jersey Historical Commission will administer programs for endowment and stabilization as they relate to history and humanities organizations.
- New Jersey Historic Trust will administer a program for capital projects as it relates to history organizations.
- New Jersey State Council on the Arts will administer programs for all three Trust purposes as they relate to arts organizations.

Recommendations will be made at least once annually.





# FY02 ACCOMPLISHMENTS

On July 12, 2001 the Cultural Trust Board convened for its inaugural meeting in Trenton. At that meeting, Board members were sworn-in. They adopted by-laws and elected officers as follows:

**Judi Dawkins, Chair**  
**Josh Weston, Vice-Chair**  
**Mitchell Shivers, Vice-Chair for Finance**  
**Carol Cronheim, Secretary**

At this meeting the Board also began the process of developing rules and regulations to govern its work and authorized the Executive Committee to begin a search for an executive director.

At the second meeting, held September 20, 2001 the Trust Board adopted emergency rules and concurrently proposed permanent rules to be published in the New Jersey Register. The emergency rules were filed September 26, 2001.

Throughout the autumn, the Trust Board conducted the search for a Director. In keeping with the provisions of the Act and the rules that were in the process of being promulgated, the Board designed and distributed the guidelines and forms to be employed by organizations in applying to be "qualified" and to have private contributions to their respective endowments certified. The distribution was wide including direct mailing to the persons and organizations on the mailing lists of the Council on the Arts, Historical Commission and Historic Trust, as well as postings on their respective websites.

The first applications were received on December 10, 2001.

On December 18, 2001 the Board met and took action to approve "qualification" of 48 of the 94 applicant organizations. For a complete listing of them see page 14. The Board also certified \$27,496,105 in endowment donations to 18 qualified organizations of which \$27,321,690 were large gifts (\$100,000 or more) to 13 of them.

At that time there was \$2,040,000 in the Trust Fund and another \$12 million available through state appropriations in FY 01 and 02. The certification of over \$27 million in large gifts leveraged all \$12 million in state appropriation into the Trust Fund as the state match. It also allowed for distribution of \$2.4 million, 20% of it, to the 13 organizations, matching the first \$100,000 of all 13 and distributing the rest as a proportionate share of the total remaining available funds.

The fact that the private sector contributions overmatched the available state funds by more than \$15 million meant that 11 of those 13 organizations were entitled to additional state funds of

more than \$3 million at such time as funds were next appropriated. For a complete listing of all gifts certified and payments processed and owed, see the table on page 23.

The Board also approved the hiring of Barbara Fulton Moran as the first Executive Director of The New Jersey Cultural Trust.

By the March 5, 2002 Board meeting contracts for issuing payments had been approved, and the Trust office had been established on the fourth floor of 225 West State Street in space shared with the New Jersey State Council on the Arts. Later that month the rules for Trust operation were finalized and the Governor's FY03 budget message was delivered. It contained the proposal of another \$10,000,000 for the Trust as well as a separate administrative appropriation.

As the fiscal year drew to an end

- The agency operations had been established.
- All payments from available funds had been distributed.
- All groups deemed "qualified" had received and executed agreements governing the designation.
- Work had continued to address the deficiencies of other applicants for qualification.
- Short and long-term agency goals had been put in place.
- Discussions had taken place with the Division of Investment to understand its work and the options available to the Trust regarding the investment of its funds.
- A video about the purposes and work of the Trust had been created and the Director had made numerous public presentations.
- Work had begun that will lead to professionally printed marketing materials about the Trust and to the establishment of a website.

As the Trust entered the new fiscal year and planned for its July 16th FY02 Annual Meeting, it received the good news that the FY 03 State of New Jersey budget contained the \$10,000,000 proposed by the Governor as well as a \$385,000 administrative appropriation to carry on its work.





# FUND STATUS

On July 1, 2001 the value of the investment Trust Fund stood at \$2,138,611.61. This was composed of \$1,020,000 in direct private contributions, \$1,015,000 in state matching funds and \$103,611.61 in interest earnings.

With the approval of the State of New Jersey's FY02 budget a total of \$12,000,000 (\$2,000,000 from FY01 and \$10,000,000 from FY02) was maintained in state accounts and available to be transferred to the Fund upon the certification of private contributions.

By the December 18, 2001 meeting of the Trust Board, an additional \$33,601.80 in interest earnings had accrued to the Fund, raising its value to \$2,172,213.42. Board actions certifying some \$27,496,105 in private contributions to the endowments of qualified organizations then leveraged on January 8, 2002 all \$12,000,000 of the state's appropriations into the Fund. This, along with \$4,578.39 in one month's additional interest, raised the Fund total to \$14,176,791.82.

Distributions totaling \$2,395,000 were made in two withdrawals in April and May to match certified large gift donations to the limit of funds available.

Interest earnings for the period between January 8 and the close of the fiscal year totaled \$150,936.06.

Thus at the close of the fiscal year the total value of the Fund stood at \$11,932,727.88: \$1,020,000 from private sources, \$10,620,000 from state contributions and \$292,727.88 from interest earnings over the life of the Fund. In addition, \$27,496,105 of additional private sector funding had been contributed to the endowments of qualified cultural organizations because of the Fund's program.

Throughout this entire period Trust Funds have been invested in the State of New Jersey Cash Management Fund.



The American Boychoir School

Peter Mott House - Underground Railroad





# FIVE-YEAR FISCAL PLAN/FUND GROWTH

As cited earlier, the Fund is currently held in the State of New Jersey Cash Management Fund (CMF) managed by the NJ Division of Investment. The Trust Board has just recently established an investment committee to work with the Division of Investment in establishing investment goals and monitoring a portfolio. As such, long-term Fund growth projections can only be estimated at this time by assuming the entire Fund remains in CMF.

The other assumptions made in presenting these estimates of valuation over time are

- 1) that the State of New Jersey annually appropriates \$10 million as called for in the Act
- 2) that the Trust is annually able to certify contributions to the endowments of qualified organizations sufficient to leverage the entire state appropriation into the Fund, and
- 3) that the Trust certifies large gift donations sufficient to cause 20% of the state matching funds to be distributed.

What follows are two scenarios for growth and within each are two variations. Scenario 1 sets the annual compound interest earned at 3.06%, which is the average of the CMF's monthly performance over the past 12 months. Given that 3.06% is one of the lowest rates in the history of the Fund, Scenario 2 is calculated at a rate of 5%, which is more comparable to long-term performance of the Fund.

The variations in each scenario relate to the actions of the Board once the Fund crosses the \$20 million threshold of contributed income. The first column shows how the Fund grows if ALL interest earnings are reinvested over five years. The second shows how the Fund grows if interest earnings are distributed as grants.



The Morris Museum

## Scenario 1 – assumes 3.06% compound annual interest

Date	Value Interest Reinvested	Value/Interest Distributed
July, 1, 2002	\$19,932,727	\$19,932,727
7/1/03	\$28,542,668	\$27,640,000*
7/1/04	\$37,416,073	\$35,640,000
7/1/05	\$46,561,004	\$43,640,000
7/1/06	\$55,985,770	\$51,640,000
7/1/07	\$65,698,934	\$59,640,000

## Scenario 2 – assumes 5% compound annual interest

Date	Value Interest Reinvested	Value/Interest Distributed
7/1/02	\$19,932,727	\$19,932,727
7/1/03	\$28,929,363	\$27,640,000*
7/1/04	\$38,375,831	\$35,640,000
7/1/05	\$48,294,622	\$43,640,000
7/1/06	\$58,709,353	\$51,640,000
7/1/07	\$69,644,820	\$59,640,000

\*Some \$292,727.88 of the \$902,668 in interest distributed accrued to fund prior to 7/1/02.



The Newark Museum



# GOALS AND PRIORITIES

## Goal 1.

**Grow the Cultural Trust Fund:** With an initial goal of \$200 million in principal, the Trust is intended to grow through an annual appropriation of \$10 million from the New Jersey Legislature for ten years to match private funds either contributed directly to the Fund or to the endowments of qualified organizations. To date, certified private contributions have outpaced state appropriations \$29 million to \$23 million, and this imbalance is anticipated to grow with the next round of FY03 submissions for certification of gifts. Thus the following long and short-term objectives:

1. Seek additional state funds to restore and always maintain the 1:1 relationship of public to private dollars and annually secure \$10 million state appropriation
2. Certify on at least a semi-annual basis new donations to endowments of qualified organizations
3. Develop and carry out an aggressive campaign encouraging private sector donations to Cultural Trust and to qualified organizations (See Marketing Goal)
4. Monitor Fund performance closely and implement an investment strategy to achieve goals through maximum yield within well-defined and prudent parameters of risk tolerance



Wheaton Village

## Goal 2.

**Grow the Cultural Trust Programs:** When the sum of state and private contributions to the Trust Fund achieves a balance of \$20 million, the Trust Board may authorize distribution of interest earnings in the form of grants to arts, history and humanities organizations for institutional/financial stabilization, endowment and/or capital projects. Recipients are to be recommended to the Trust through programs established and administered by the NJ State Council on the Arts, the NJ Historic Trust and the NJ Historical Commission. At this writing none of these programs has been established and the Fund itself is just a bit shy of the \$20 million threshold. In the early years, even if all interest earnings are made available for grants making, the total dollars will be relatively small, suggesting some need for prioritization and coordination of these three new program efforts. Nonetheless, once these new programs come on line, the number, nature and magnitude of Cultural Trust grants being administered will increase greatly. Thus the following objectives:

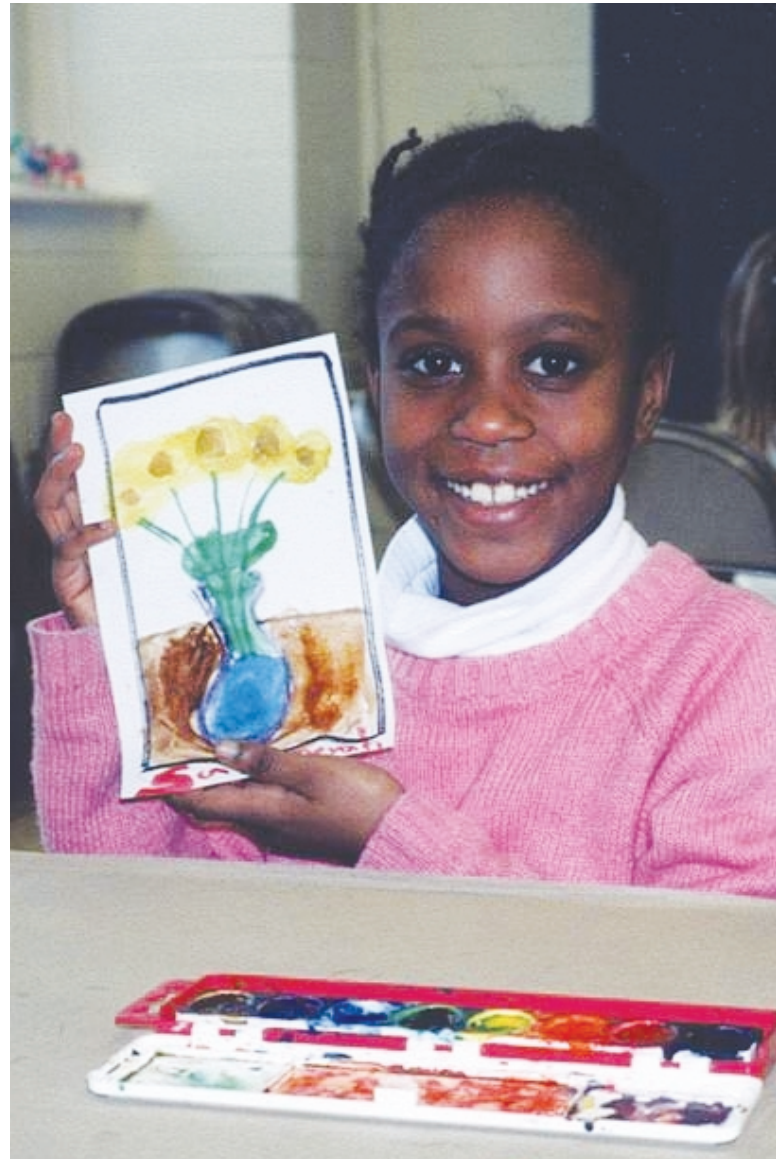
1. Ensure Cultural Trust staff capacity to provide assistance to recommending agencies and full administrative oversight and program outreach. Establish and fill needed positions.
2. Research and develop priority programs by end of FY 03 for implementing in FY 04 the first round of grantmaking with the Council on the Arts, the Historical Commission and the Historic Trust.
3. Cultivate professional development and technical assistance opportunities by which to increase and share knowledge about stabilization issues among Trust Board and staff as well as recommending agencies
4. Establish procedures and timetables for administering programs and monitoring grants

# GOALS AND PRIORITIES

## Goal 3.

*Grow the number of participants in and contributors to the success of the Cultural Trust:* For the Cultural Trust to establish and demonstrate its maximum public value and impact it must 1) grow as quickly as possible 2) engage as many qualified organizations as possible and 3) encourage more and more donors to support its purposes. To a large extent this means mounting effective communications and outreach as well as compelling marketing and development campaigns both on behalf of the Trust and the constituency it seeks to serve. Thus the following objectives:

1. Maintain rolling approval process for qualifying organizations for program eligibility.
2. Develop and offer education and technical assistance opportunities for cultural organizations.
3. Develop and cultivate relationships with professional service organizations, associations and bodies aligned with the goals and work of the Trust
4. Secure speaking engagements to inform targeted audiences of the Cultural Trust and develop presentations and collateral materials for use by staff and Board members.
5. Develop and maintain effective communications with the New Jersey Legislature
6. Develop marketing and outreach materials for general and targeted distribution designed to encourage new, significant and innovative donations both to the Cultural Trust directly and to the stabilization, endowment and capital initiatives of qualifying organizations.
7. Monitor and analyze the results of Cultural Trust grants to reveal the public benefits of stable cultural organization
8. Widely and effectively disseminate information about the Cultural Trust through various means and media and create and maintain a website with helpful and up-to-date information regarding the Trust.







## Goal 4.

### *Grow and maintain public trust in the Cultural Trust:*

Though often the least glamorous of all aspects, the effective management of Trust operations to the highest standards of public accountability and the focused deployment of its limited resources are essential to safeguarding its viability and position as a steward of public and private funds and to engender public confidence in its worth.

1. Establish and implement agency management standards and procedures consistent with state policies and regulations.
2. Establish, implement and maintain grants management function that closely monitors grantee performance to ensure accountability, timeliness and accessibility.
3. Establish and implement fiscal management function to ensure internal control.



4. Oversee agency staffing and personnel management according to established rules, policies and procedures in hiring and supervision while maintaining the highest level of staff performance.
5. Ensure on-going professional development for Board and Staff.
6. Conduct annual certified audit of Fund.
7. Ensure the implementation of the Open Public Records Act and the public's appropriate and timely access to public information.



# QUALIFIED ORGANIZATIONS BY COUNTY

*The following forty-eight organizations have been designated "Qualified Organizations" as defined under the rules of The New Jersey Cultural Trust, as of December 2001:*



The Morris Museum

## *Bergen County*

### **Arts Horizons**

#### **Englewood, New Jersey**

To foster the development of the whole person and to improve education by delivering quality arts programs and activities to schools and communities.

### **Friends of the Hermitage, Inc.**

#### **Ho-Ho-Kus, New Jersey**

The Friends of the Hermitage, Inc. was established to restore, maintain and interpret the Hermitage, along with its grounds and outbuilding. The mission is not only to provide these services, but also to interpret to a diverse audience of students, scholars and the general public the site, its archives and its collections as they relate to local, regional and national history beginning in 1740.

### **John Harms Center for the Arts**

#### **Englewood, New Jersey**

The mission of the John Harms Center for the Arts is to make the live performing arts accessible and speak to the lives of its diverse community – building a creative home to artists of excellence and relevance, who entertain and enlighten, inspire and inform its audiences. The Center is an organization of and for the community that it serves by being a creative focus, educational resource and engine of economic vitality.

### **Nai-Ni Chen Dance Company**

#### **Fort Lee, New Jersey**

The Nai-Ni Chen Dance Company brings the rich tradition of Chinese Art into the contemporary dance world. Over half a million people around the country have shared the original works created by the company, a multi-racial group of dancers from Asia, Europe, South America and North America.

### **Old Church Cultural Center School of Art**

#### **Demarest, New Jersey**

The mission of Old Church Cultural Center School of Art is to foster the innate creativity in everyone, to enrich the quality of life in the community through interdisciplinary and multicultural programs and instruction in fine arts and crafts by a faculty of professional artists and to encourage a supportive environment for students, faculty, members and volunteers in which artistic growth, personal fulfillment and a lively exchange of ideas flourish.

## *Burlington County*

### **Alice Paul Centennial Foundation**

#### **Mt. Laurel, New Jersey**

The mission of the Alice Paul Centennial Foundation is to celebrate and promote the legacy of Alice Paul, noted suffrage leader and author of the Equal Rights Amendment and to preserve Paulsdale, her family home, as an inspirational and educational site. The Foundation works to educate and encourage women and girls to take leadership responsibilities in their communities and to continue the long struggle for women's equality.





The Newark Museum

## Camden County

### Camden County Historical Society Collingswood, New Jersey

The mission of the Camden County Historical Society is to collect, preserve and disseminate the history of Camden County and southern New Jersey in order to serve educational and civic purposes for the Camden County and southern New Jersey communities.

### The Haddonfield Symphony Haddonfield, New Jersey

The mission of the Haddonfield Symphony is to maintain and support a symphony orchestra that provides training for tomorrow's orchestra musicians, music directors, soloists and audiences, by presenting well-rounded, artistically excellent educational programs, which contribute to enriching the cultural life of our global community.

## Cape May County

### Historic Cold Spring Village Cape May, New Jersey

Historic Cold Spring Village is a non-profit educational institution established primarily as an open-air living history museum. Its purpose is to function solely and exclusively as an educational, historical and literary foundation. This is carried out by supporting, conducting and sponsoring literary and artistic endeavors through displays, publications, live performances, films, traveling and loan exhibits representative of the 1800's.

## Cumberland County

### Wheaton Village, Inc. Millville, New Jersey

It is the mission of Wheaton Village to "celebrate and share the creative spirit of American glass and other craft."

Wheaton Village



## Essex County

### Aljira, A Center for Contemporary Art Newark, New Jersey

Aljira is a contemporary art center whose mission is to encourage activity in the visual arts and through the medium of art to serve as a catalyst for inclusiveness and diversity; to promote cross-cultural dialogue and to enable us to better understand the time in which we live.

### ArtsPower, Inc. Montclair, New Jersey

The mission of ArtsPower National Touring Theatre: to produce and tour nationally recognized, professional theatre of the highest artistic quality and educational value that is intended to nourish children's love of theatre, deepen their connection to pro-social values and instill in them what it means to be a good person in heart, mind and deed.

### New Jersey Chamber Music Society Montclair, New Jersey

The purpose of the New Jersey Chamber Music Society is to enrich cultural life in the State and beyond by presenting traditional and innovative concerts and education programs of the highest professional quality, and by reaching out to diverse audiences in order to make these activities available to all segments of the general public.

### New Jersey Performing Arts Center Newark, New Jersey

The New Jersey Performing Arts Center opened to international acclaim on October 18, 1997 and is the sixth largest arts center in the United States. As a different kind of arts center, NJPAC aims to be a world-class cultural landmark that is community-centered, embracing the diversity of all New Jersey.

### New Jersey Symphony Orchestra Newark, New Jersey

The mission of the New Jersey Symphony Orchestra is to engage the people of New Jersey by performing the full symphonic repertoire at the highest caliber in a variety of settings for diverse audiences and to serve with distinction as a nationally recognized orchestra and cultural leader, especially in music education for all ages

### Paper Mill Playhouse Millburn, New Jersey

Paper Mill Playhouse, the State Theatre of New Jersey, seeks to enrich the cultural lives of a wide and diverse audience. Since opening in 1938, the theatre has become a nationally recognized not-for-profit professional arts center committed to excellence and to preserving the rich heritage of plays and musicals through productions of the highest quality.



Ruben Santiago-Hudson in *Lackawanna Blues* At McCarter Theatre

## *Essex County (continued)*

### **The New Jersey Historical Society**

#### **Newark, New Jersey**

The New Jersey Historical Society is a statewide, private, nonprofit historical museum, library and archives dedicated to collecting, preserving and interpreting the rich and intricate political, social, cultural, and economic history of New Jersey to the broadest possible audiences. Founded in 1845, it is the oldest cultural institution in the state.

### **The Newark Museum Association**

#### **Newark, New Jersey**

The Newark Museum operates, as it has since its founding, in the public trust as a museum of service, a leader in connecting objects and ideas to the needs and wishes of its constituencies. It is their stated belief that their art and science collections have the power to educate, inspire and transform individuals of all ages, and the local, regional, national and international communities that they serve. In the words of founding director John Cotton Dana, "A good museum attracts, entertains, arouses curiosity, leads to questioning – and thus promotes learning."

## *Gloucester County*

### **Gloucester County Historical Society**

#### **Woodbury, New Jersey**

The mission of the Gloucester County Historical Society is to acquire and preserve artifacts, documents and records that relate to the history of the County, New Jersey and the Delaware Valley; to encourage the protection and preservation of the historical landmarks within the County; to encourage historical research; and to provide related publication materials.

## *Hudson County*

### **Jersey City Museum, Inc.**

#### **Jersey City, New Jersey**

The Jersey City Museum promotes pride in Hudson County by celebrating its unique cultural history. The Museum preserves and interprets collections of material culture from the region, so that the history of Hudson County is illuminated from generation to generation. The Museum stimulates community participation in the visual arts, giving special attention to contemporary art and recognizing the many visual artists who make Hudson County their home.

### **Liberty Science Center**

#### **Jersey City, New Jersey**

Liberty Science Center is an innovative learning resource for lifelong exploration of nature, humanity and technology, supporting the growth of this diverse region and promoting informed stewardship of the world.



## *Hunterdon County*

### **Hunterdon Museum of Art Clinton, New Jersey**

Hunterdon Museum of Art is committed to providing quality programming that will enhance and encourage appreciation of, understanding of and involvement with art. This is accomplished through exhibitions that reflect artistic excellence and education programs that include studio, outreach and interpretive experiences.

### **Riverside Symphonia Lambertville, New Jersey**

The mission of the Riverside Symphonia is to provide a locally based, professional orchestra to serve the people of mid-western New Jersey and eastern Pennsylvania. The Symphonia strives to reach all segments of the community, regardless of ethnicity, age or financial means and to deliver quality musical performances by composers from all periods to foster the appreciation of our rich and diverse cultural musical heritage.

## *Mercer County*

### **Historic Morven, Inc. Princeton, New Jersey**

Morven, an eighteenth-century house and gardens owned by the State of New Jersey and leased to Historic Morven, exists as a museum and cultural center. The mission of Historic Morven, Inc. is to preserve and manage this national historic property and its collections as a cultural, educational, and historical resource for present and future generations.

### **McCarter Theatre Princeton, New Jersey**

The creation of theater is at the heart of McCarter's artistic mission, and the theater's goals are threefold: to evolve into a world-class theater with a demonstrated commitment to the highest professional and artistic standards; to present a diverse season of classic and contemporary plays that reflect and invite comparison among various aspects of American culture and the universal human experience; and to reinvigorate audiences by welcoming and encouraging all members of the community regardless of age, gender, ethnicity, race or class to participate in the transformational experience of live performance.

### **Princeton Pro Musica Princeton, New Jersey**

Princeton Pro Musica's mission is the presentation of high-quality performances of masterworks for chorus and /or orchestra, including contemporary and multicultural works, and the education and enhanced quality of life of present and future audiences



### **Princeton Symphony Orchestra Princeton, New Jersey**

The mission of Princeton Symphony Orchestra is to present the finest classical compositions from the widest range, including unusual and seldom heard works; to enhance audience appreciation of the often unfamiliar works through lectures and presentations; to create an outstanding performance opportunity for the many excellent musicians in the central New Jersey region, and to reach out to new audiences both geographically and demographically.

### **The American Boychoir School Princeton, New Jersey**

The mission of The American Boychoir School is to sustain and move forward with a distinctively American voice a one-thousand year-old choral music tradition; to create a truly national choir that provides an exceptional education program for musically talented boys, regardless of their religion, race, social background, or financial circumstances; to enrich the cultural and educational life of our nation; and to produce a musical performance organization that is recognized throughout the world as the finest of its kind.

## *Middlesex County*

### **Institute for Arts and Humanities Education New Brunswick, New Jersey**

The mission of the Institute for Arts and Humanities Education is to provide innovative, interdisciplinary programs in the arts and humanities to students, their teachers and their families, with emphasis on serving at-risk and under-served communities.

### **State Theatre Regional Arts Center at New Brunswick New Brunswick, New Jersey**

The State Theatre Regional Arts Center at New Brunswick exists to enrich the lives of people from diverse backgrounds in New Jersey and to contribute to a vital urban environment by presenting the finest national and international performing arts, providing arts education to inform and build future audiences, assisting community arts organizations with technical and other professional expertise and encouraging New Jersey artists by providing a first-class showcase for their work.

## Monmouth County

### **Count Basie Theatre** **Red Bank, New Jersey**

The Count Basie Theatre and Performing Arts Center is a performing arts center producing and presenting quality arts programs and activities to promote appreciation and understanding of the arts and to enrich the lives of its diverse community. Count Basie Theatre's vision is to be recognized as a leader in the arts by extending the Theatre into a regional arts performance and learning center.

### **Monmouth County Historical Association** **Freehold, New Jersey**

The purposes of the Monmouth County Historical Association are to collect, preserve, interpret and make available to the public furnishings, artifacts, buildings, manuscripts, artwork and publications related to the County's history. The Association also promotes the study and appreciation of regional and national history through its collections, educational programs, exhibits, publications, library and archives. Through its pursuit of these objectives, the Association enriches the quality of life in Monmouth County.

### **Two River Theatre Company** **Red Bank, New Jersey**

Two River Theatre Company is a not-for-profit professional theatre in Red Bank, New Jersey established to provide the opportunity for theatre artists to work at and for the community's theatre audience, to witness theatre events, the choice and character of which will be guided by a number of beliefs: theatre is a necessary institution if society is to maintain a truly human discourse and strive toward significant communality. Two River Theatre Company will choose to perform from the world body of dramatic literature, including new works, those plays which, despite their inevitable fragmentary perspectives, most richly direct our gaze to the life of the human spirit in all of its shifting modes, its thought, its suffering, its passion, its joy and laughter.

## Morris County

### **Arts Council of the Morris Area** **Madison, New Jersey**

The mission of the Arts Council of the Morris Area is to significantly enhance the arts and their impact on the quality of life in the Morris Area.

### **Colonial Symphony** **Basking Ridge, New Jersey**

The Colonial Symphony's mission is to sustain and nurture an outstanding orchestra for Northern New Jersey, sponsor only performances of the highest quality, integrity and merit; emphasize a balance of traditional and contemporary classical music and enhance music understanding and performance skills through education outreach.

### **Macculloch Hall Historical Museum** **Morristown, New Jersey**

Macculloch Hall Historical Museum preserves the history of the Macculloch-Miller families and the Morris Area community and the legacy of its founder, W. Parsons Todd, through its historic site, collections, exhibits, educational and cultural programs. The museum is a not-for-profit educational affiliate of the W. Parsons Todd Foundation.

### **Museum of Early Trades & Crafts** **Madison, New Jersey**

The Museum of Early Trades and Crafts is an educational institution that explores and presents the history and lifeways of ordinary pre-industrial America through its collections, presentations, and exhibitions of hand tools and their products.

### **New Jersey Shakespeare Festival of Morris** **Madison, New Jersey**

The New Jersey Shakespeare Festival is the State's only professional theatre company dedicated to the presentation of Shakespeare's canon and other classic, dramatic entertainments for the cultural enrichment of the community. The Festival places an equal emphasis on education – both for young artists and young audiences. It endeavors to promote all of the arts, literacy, civilization, community, cultural awareness, the theatrical tradition, and a more enlightened view of the world we live in and the people with whom we share it.

### **South Street Theater Co., Inc.** **Morristown, New Jersey**

The Community Theatre will become "a place for all the arts," offering the full range of performing arts for all segments of the community. The Theatre will also become an educational resource, with master classes and internship opportunities. The overall goal is to become one of the very best performing arts venues in the country, one sought after by audiences and performers alike.

### **The Growing Stage Theatre for Young Audiences, Inc.** **Netcong, New Jersey**

The mission of The Growing Stage Theatre is to nurture the development of the performing arts in our community through education, and to create, produce and perform works that engage the entire family.





**The Morris Museum  
Morristown, New Jersey**

The mission of the Morris Museum is to elevate the cultural consciousness, excite the mind and enhance the quality of life. The Morris Museum advances the understanding and enjoyment of the visual and performing arts, natural and physical sciences and humanities through exhibitions, performances and educational programs in a welcoming, inclusive and creative environment that responsibly uses all Museum resources.

***Ocean County***

**Barnegat Bay Decoy & Baymen's Museum, Inc.  
Tuckerton, New Jersey**

The mission of the Barnegat Bay Decoy and Baymen's Museum is to preserve, present and interpret the rich maritime history, heritage and environment of the New Jersey Shore and the unique contributions of its baymen.

**Friends of the Ocean City Pops  
Ocean City, New Jersey**

The Friends is a non-profit corporation with the exclusive goal of charitable and educational purposes to promote excellence in the programming, performance and continuing development of the Ocean City Pops Orchestra.

**Long Beach Island Foundation of the Arts and Sciences  
Loveladies, New Jersey**

The Long Beach Island Foundation of the Arts and Sciences is devoted to the teaching, support and enhancement of the creative arts and physical sciences. Through its classes, exhibitions and other activities the Foundation provides broad educational and cultural programs for all ages.

***Passaic County***

**American Labor Museum/Botto House National Landmark  
Heledon, New Jersey**

The overall purpose of the American Labor Museum is to advance public understanding of the history of work, workers and the labor movement in the United States.

***Salem County***

**Appel Farm Arts and Music Center  
Elmer, New Jersey**

Appel Farm's mission is to provide people of all ages, cultures and economic backgrounds with a supportive, cooperative environment in which to explore the fine and performing arts. This commitment is rooted in the belief that the arts are an exciting and essential part of the learning process, and that artistic talent is innate and waiting to be developed in every person.

***Somerset County***

**Philharmonic Orchestra of New Jersey, Inc.  
Warren, New Jersey**

The mission of the Philharmonic Orchestra of New Jersey, a professional symphony orchestra, is to perform concerts and to increase the appreciation of classical music through educational offerings.

***Union County***

**Historical Society of Plainfield  
Plainfield, New Jersey**

The purpose and mission of this organization is to foster an interest in history through educational programs and to maintain the Drake House Museum for the City of Plainfield, New Jersey.



# SUMMARY OF CERTIFIED DONATIONS AND LARGE GIFT MATCHES

THE NEW JERSEY CULTURAL TRUST ORGANIZATIONS WITH CERTIFIED DONATIONS	Total \$'s Certified	Large Gifts	20% of Large Gift	2002 Payment	Total Due	2003 Payment	Remaining Total Due
NEW JERSEY SYMPHONY ORCHESTRA	\$5,273,878	\$5,273,878	\$1,054,776	\$445,460	\$609,316	\$397,654	\$211,662
PRINCETON PRO MUSICA	\$25,000						
MORVEN FOUNDATION	\$500,000	\$500,000	\$100,000	\$52,893	\$47,107	\$30,743	\$16,364
MCCARTER THEATRE	\$737,221	\$737,221	\$147,444	\$72,400	\$75,044	\$48,975	\$26,069
HUNTERDON MUSEUM OF ARTS	\$395,091	\$395,091	\$79,018	\$44,226	\$34,752	\$22,680	\$12,072
NJ PERFORMING ARTS CENTER	\$10,675,000	\$10,675,000	\$2,135,000	\$889,607	\$1,245,393	\$812,773	\$432,620
NJ SHAKESPEARE FESTIVAL	\$50,000						
LIBERTY SCIENCE CENTER	\$300,000	\$300,000	\$60,000	\$36,446	\$23,554	\$15,372	\$8,182
THE NEWARK MUSEUM	\$6,273,115	\$6,273,115	\$1,254,623	\$527,630	\$726,993	\$474,453	\$252,540
HISTORIC COLD SPRING VILLAGE	\$100,000	\$100,000	\$20,000	\$20,000			
BARNEGAT BAY MUSEUM	\$100,000	\$100,000	\$20,000	\$20,000			
ALJIRA ARTS	\$300,000	\$300,000	\$60,000	\$36,446	\$23,554	\$15,372	\$8,182
MORRIS MUSEUM	\$1,084,595	\$1,049,595	\$209,919	\$98,087	\$111,832	\$72,984	\$38,848
WHEATON VILLAGE	\$180,000	\$180,000	\$36,000	\$26,579	\$9,421	\$6,148	\$3,273
AMERICAN BOYCHOIR SCHOOL	\$1,437,790	\$1,437,790	\$287,558	\$130,010	\$157,548	\$102,820	\$54,728
NJ CHAMBER MUSIC SOCIETY	\$2,500						
MONMOUTH COUNTY HISTORICAL SOCIETY	\$7,000						
FRIENDS OF THE HERMITAGE	\$54,915						
	<b>\$27,496,105</b>	<b>\$27,321,690</b>	<b>\$5,464,338</b>	<b>\$2,399,784</b>	<b>\$3,064,554</b>	<b>\$1,999,974</b>	<b>\$1,064,540</b>

Approved: December 2001



# THE NEW JERSEY CULTURAL TRUST BOARD OF TRUSTEES-FY02

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*Left to Right - Josh Weston, Judith Dawkins, Barbara Fulton Moran, Marc Mappen,  
Leonard Fisher, Judith Shaw, Barbara Mitnick, Dorothea Frank, Carol Cronheim*



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